Real-time, interactive sales and services across the Internet: Optimizing the customer experience

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Abstract:

*Many companies are finding that a major requirement for optimizing customer contact through the **Internet** is enabling connection to the most responsive customer interfaces ever built: live, human, company representatives. The concrete benefits of implementing a real-time, Web-based customer sales and service system are compelling: 1. shortened sales cycles, 2. increased ROI of existing sales and service operations, and 3. ability for reps to close transactions and proactively cross-sell/**upsell** customers in real-time. The challenge for organizations is to provide a system that will work for the universe of customers on the **Internet**.*

Full Text:

Corporate Web sites are no longer just sources for marketing information; they've become channels for conducting business -- delivering pre-sales assistance, performing transactions and providing post-sales service and support. Leading organizations are extending their existing operations by integrating the Internet into their sales and service processes. The overall goal: to optimize customer contact through the Internet as a way to build customer acquisition and retention.

Many companies are finding that a major requirement for doing this is enabling connection to the most responsive customer interfaces ever built: live, human, company representatives. This isn't surprising - most customers typically have a few final questions to ask before they place an order for a product or service; they want to better understand the online purchase procedure; and they want to be assured that their order will be correctly understood and processed. Indeed, Yankelovich Partners recently reported that 63 percent of Web users are unwilling to purchase online until there is more human interaction involved.

Web-based interaction between company reps and customers generally takes two forms:
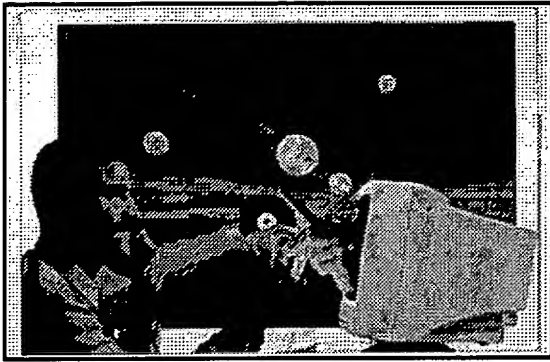
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* Visual collaboration in conjunction with a phone call. Today, this means separate phone and Internet connections; in the future, as Internet telephony advances and telephony-enabled PCs and browsers become more common, this will be a single connection with the PC serving as both the telephone and the browser.

* Visual collaboration with text communication. In this case, a private, real-time text-chat window allows the rep and the customer to communicate at the same time as they are collaborating online. This is important, as most home users do not have an extra phone line available while shopping online.

In both cases, visual collaboration adds extraordinary value over a simple telephone call or chat session. Reps can perform escorted browsing to guide customers to particular pages (crossselling/upselling), push files (documentation, sales collaterals) and software (a demo or software patch) or even deliver a sales presentation via the browser interface.

There are, however, several technical challenges to overcome when deploying real-time, interactive sales and service over the Web.

Benefits And Requirements

The concrete benefits of implementing a real-time, Web-based customer sales and service system are compelling:

* Shortened sales cycles,

*Increased ROI of existing sales and service operations,

* Ability for reps to close transactions and proactively cross-sell/upsell customers in real-time,

* Increased customer loyalty (and retention),

* Higher recurring revenue.

There are, however, many considerations to take into account when selecting and deploying such an application. The solution needs to be effective for both the company and its customers. From the company's perspective, the application should map seamlessly to existing sales and service operations, provide enterprise-class functionality across the Internet and give managers the ability to optimize system and staff performance. Basic requirements include:

* Mission-critical, highly available server systems,

* Ease-of-use for customers, reps and system administrators,

* Effective security protocols,

* Straightforward integration with existing systems,

* Comprehensive system management, monitoring and reporting capabilities,

* The ability to work on all browsers and in all browsing environments.

From the customers' perspective, the solution needs to work - it needs to perform effectively across the fragmented, heterogeneous medium known as the Internet. And it needs to do this without requiring software downloads, installs or browser upgrades. The rest of this article discusses the reality of the Internet landscape and an architectural approach that achieves the ability to "work everywhere."

Barriers To Real-Time Sales And Service Operations

The challenge for organizations is to provide a system that will work for the universe of customers on the Internet. Unfortunately, this is not easy - there are at least a dozen different browser types, hardware and software platforms, and applications that need to be supported for a sales and service application to work for all users.

Within the technology marketplace, we generally see a bell curve model of adoption, with more late adopters of new technologies than there are early adopters. Translation: the majority of Internet users have not yet upgraded to the latest version of Netscape or Internet Explorer. However, in response to the dizzying pace of technology advances in this market, some Web designers have chosen to build their sites primarily for the latest browser versions (e.g., "This site best viewed with Netscape Communicator 4.0 or later"). While this gives designers the ability to use advanced technologies as they build a site, middle-of-the-curve technology adopters don't get optimal service, and often feel frustration and resentment when they can't access particular parts of a site.

Moreover, in the corporate environment there is an added challenge. Security concerns among many corporations have led them to deploy measures such as firewalls to protect the integrity of their data and restrict access to the network; these same security measures often prevent the use of certain advanced technologies such as Java. Since this corporate user base is the foundation of business-to-business e-commerce, it is an absolute requirement to address the unique limitations and characteristics of the corporate environment in which they work. Applications that require Java do not effectively address typical firewall and Extranet configurations, inhibiting a company's ability to conduct business with its customers and partners.

"The business-to-business category is complex not only because these ebusiness solutions must be especially reliable and manageable, but also because of the challenges in integrating and providing optimal connectivity through secured networks," said Allen Bonde, director of Advisory Services at The Extraprise Group, an e-business consulting and systems integration firm.

Guiding Principles For Architecture Development

There are two guiding principles for developing a real-time customer service solution. To put a system in place, companies must provide an optimal customer experience for the entire spectrum of users, from

advanced technology adopters to those lagging well behind the adoption curve. Second, it is important to use universal Web browsing technologies that are seamless and completely unobtrusive to the user the customer should not be required to download or install additional software nor upgrade to the latest browser.

"This kind of solution makes a lot of sense for the Internet marketplace," added Bonde. "We are starting to see a movement toward 'customer-focused ebusiness' rather than a one-size-fits-all approach among leading companies. For example, adapting to the customer's preferences and their computing environment can ensure they will receive an optimal system that meets their particular needs."

Technology That Works Everywhere

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A brief summary of commonly used browsers and platforms can
serve to partially illustrate the complexity of the Web as an
application platform today:

To address these two principles for real-time customer service, you need a platform that allows sophisticated Web applications to be created in a way that targets users across a wide variety of environments while presenting a consistent and well-understood set of functions to end users. Technology is now available to do this.

The technology "sniffs out" the user's environment and instantly alerts representatives of the capabilities the user's platform can accept. For example, a potential customer is looking to purchase office supplies on a merchant's Web site and seeks live assistance. This customer is coming in from an Internet Explorer 4.0 browser and is connecting through a firewall that strips out Java. When the customer connects to the live service area on the Web site, the technology automatically detects that a link is being established from behind a firewall and that Java has been disabled across the company's network. This information is then used to generate an optimal client interface that will work within the customer's browser environment.

The end result of this invisible analysis: advanced Internet users with the latest systems can enjoy the benefits of advanced technology features, and those with more restrictive environments can still benefit from real-time, interactive communication.

How It Works

Built-in technology sensors detect the browser vendor and version, operating system, hardware platform, network environment and available application technologies (such as plug-ins) of a user coming into a session. A matrix is then composed to define the optimal performance mix of components based on the user's browsing environment. Concurrently, information about different user interface components and application capabilities supported is stored in a central repository.

The final stages of the process, which is completed automatically in milliseconds, takes the input from the sensors and transforms it into a set of components according to mappings prescribed in the matrix. The interface builder then retrieves components from the repository and assembles a functional application interface that is delivered to the user via a standard Web server.

Platforms For Growth

As companies embrace the Web as an infrastructure that supports all of their business functions, they require a framework that can sustain growth both in terms of the number of users it supports and in the ability to incorporate advanced new technologies. By providing a platform for optimal customer experiences and increased customer satisfaction through real-time interaction, this new technology will directly impact the rate of customer acquisition and retention - the driving force behind growing a business on the Web.

[Author note]
Company president and CEO Wendell Lansford cofounded SiteBridge Corporation in 1996. Previously, Lansford was the director of technology for CondeNet, the online division of Conde Nast Publications, where he was responsible for launching the Webbased properties Epicurious Food, Epicurious Travel and Swoon. He also has experience in IT consulting with Internet Consulting Corporation, as well as technical experience in Intranet architectures and network management at Bellcore.